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ABSTRACT

The Management Responsibility Guidance (MRG) process is a matrix management program designed to clarify roles and improve staff integration, decision-making, effectiveness, and productivity. In 1976-77, Los Angeles County (California) used this approach in four pilot special education schools. As part of the MRG process, each staff member completed a task grid indicating each of his or her own particular responsibilities in the school. MRG consultants integrated these matrices into a composite grid, bringing areas of conflict or contradiction to the group for resolution. MRG consultants collected data through a Likert-type questionnaire administered to the pilot schools and 22 control schools. This questionnaire was designed to identify changes in the areas of role clarity, team character, team function, problem clarification, staff coordination, team leadership, and staff cooperation. Results indicated that the pilot schools, when compared to the control group, had significantly increased their posttest medians on a number of items. It appears that the MRG process may be a feasible technique for integrating and coordinating people and resources to achieve goals within complex educational settings. The data-gathering instruments are included in the appendices. (Author/JM)

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EVALUATION OF A MATRIX MANAGEMENT APPROACH TO SCHOOL ORGANIZATIONS

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Paper Presented at the Annual Meeting of the
American Educational Research Association
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According to Mee (1964), the most common organizational management structure is either based on *project* or *function*. The *project* structure groups diverse specialities together for the purpose of completing a specific task within a limited time frame. While the *function* structure groups commonalities of specialities together, over an extended period, for no specific task.

Galbraith (1971) believes that when the function structure is adopted, the organization experiences increased specialization and expertise. This grouping by function, however, results in limited concern among specialities relative to interrelationships, common missions, or joint responsibilities. Additional consequences occur to the organization under this form due to its inherent fostering of an entrepreneurial attitude on the part of the specialists who put the development of their own expertise first rather than the development of the organization.

In contrast, the project form of organizational structure results in an improvement in production, scheduling and cost performance, However, specializations and technical expertise do not develop at the most desirable rate. In order to combine the desirable features of both forms of organizational structure -- cost and time performance (project) and development of technical expertise (function) -- the matrix management approach was developed and first implemented in the aerospace industry (Lawrence and Larsch, 1967 ab, Larsch, 1971).

The concept of matrix management stresses the integration of function, people, and time; and has developed multiple forms in order to meet the specific demands of various organizations.

One form, Management Responsibility Guidance, (MRG) developed by Robert Melcher (1967), provides a mode through which role expectations are shared, and when in conflict, resolved, facilitates the exchange of perceptions of relationships and the integration of role function for the accomplishment of objectives. This approach attempts to improve these facets internal to the work group and provide the linkage to other work groups. This process has had success in an educational setting, where Jamieson (1976), in a urban high school district, found improved working relationships, improved organizational climate, and established a forum and structure for problem solving where none had existed previously.

THE PROBLEM

The Division of Special Education, Office of the Los Angeles County Superintendent of Schools, is a large metropolitan operating unit employing over 1,000 professional personnel in order to provide service to over 12,000 handicapped students.

In the Fall of 1976, the Division underwent an organizational restructuring which decentralized the majority of personnel to the school level from the central office, changed line positions to staff, and altered decision-making avenues. Subsequent to this reorganization, the following problems were identified: how could various specialized personnel clarify their role and function and then integrate their endeavors in a team approach for the benefit of the teachers serving the students. It was the purpose of this study to determine if a matrix management approach to organizational development, specifically the MRG process, would result in (1) a clarity of role and functional relationships, and (2) an integrated team approach to management.

PROCEDURE

Prior to the operationalization of the MRG process, it was necessary to perform certain tasks at the central office level.

The initial step was to reassign function groups of personnel (e.g., psychologists, nurses, program specialists) to the school level. All personnel would be evaluated by the individual school principal (who would operate like a project manager) instead of their technical or functional superior (e.g., supervisor of psychological services).

The second step was to create a matrix that possessed most of the task responsibilities accomplished at the school level. Those tasks appeared on the left vertical axis of the matrix. All possible roles were listed across the top horizontal axis. The tasks were created by a special ad hoc committee composed of fifteen people representing all functional specialities.

The third step was to select on a voluntary basis four pilot schools, one from each of the areas of the county. If more than one school volunteered, each area supervisor was requested to make the selection.

School Level

Each of the four schools went through the following five sequential steps. However, due to the uniqueness of each school and staff, the amount of time spent at each step varied by school.

Step I - Pre-service

A three hour pre-service explaining the MRG process, the anticipated purposes, the expected operational structure and timelines were

discussed with the total staffs of each school. Following this meeting, each school established a leadership team composed of the following personnel: principal, assistant principal, psychologist(s), program specialist(s), remedial specialist(s), nurse(s), medical specialist(s), and teacher(s).

Step II - Pre-questionnaire

Staff members at each school site were requested to respond anonymously to a Likert-type questionnaire, adopted from Jamieson (1976), for either leadership team members or teachers (See Appendices A & B). The leadership team questionnaire, containing 33 items, was designed to identify the occurrence of changes in the areas of role clarity, team character, and team function. The teacher questionnaire, containing 17 items, was designed to identify the occurrence of changes in the areas of problem clarification, role clarity, staff integration, staff coordination, team leadership, and staff cooperation. Subsequent to the administration of the survey, the results were tallied and returned to each school site.

Step III - Observations and Interviews

The MRG consultants were assigned to each school site to observe the management practice, style; and to conduct interviews with staff members. Data from the interviews was used to assist in task identification and role clarification relative to the development of the function-role matrix.

Step IV - MRG Process

Each leadership team met four hours weekly for 18 weeks in order to complete and discuss the function-role matrix. This process required the use of code letters to delineate operations and/or relationships (See Table 1 & 2) in accordance to certain rules which apply to the possible combination of letters. Each person filled out each of the task grids for themselves. If a person perceived no relationship to a specific task, the grid square was left blank. The exception to this rule was when a person perceived himself to have the operating responsibility for a task. When this occurred, that person completed the task for all people. After all the squares were completed, the MRG consultant developed a composite matrix. Areas of conflict or contradiction were brought to the group for problem resolution through negotiation. When all tasks needing resolution were completed, a final matrix was developed and distributed to the total staff.

Step V - Post-questionnaire

Staff members at each school site were again requested to complete the appropriate questionnaire and results were again returned.

STATISTICAL ANALYSIS

In order to provide a means for comparing any changes occurring in the pilot schools, the two questionnaires were also administered on a pre-post- basis to all remaining school sites (N=22) which served as a control group.

MANAGEMENT RESPONSIBILITY GUIDE
AND
PERFORMANCE RESPONSIBILITY GUIDE

TABLE 1

RESPONSIBILITY RELATIONSHIP CODES

A	GENERAL RESPONSIBILITY	Individual guides and directs execution of task through the person delegated operating responsibility.
B	OPERATING RESPONSIBILITY	Individual is directly responsible, at the operating level, for execution of task.
C	SPECIFIC RESPONSIBILITY	Individual is delegated responsibility for execution of specific or limited portion of task.
D	MUST BE CONSULTED	Individual, if decision affects his area, must be contacted prior to any decision being made or approval granted, to confer, render advice, or relate information, but does not make decision or grant approval.
E	MAY BE CONSULTED	Individual may be called in to confer, relate information, render advice, or make recommendations.
F	MUST BE NOTIFIED	Individual must be notified of action that has been taken.
G	MUST APPROVE	Individual must concur or grant approval.

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When a person is assigned or assumes "specific responsibility" for a task descriptor or event, it means the person is *functionally* accountable to the individual holding "operating responsibility" for fulfilling a *limited* portion of that task descriptor or event. It is imperative that the individuals assuming "operating responsibility" and "specific responsibility" are in agreement as to what is expected from the person assigned or assuming "specific responsibility" for a given task descriptor or event.

It is *not* necessary that each position or organization have a relationship to each task descriptor or event. If a relationship is applicable, generally, *no more than two* relationship codes may be entered for each position or organization for a task descriptor or event. There is, however, one exception. Whenever assigning or assuming the "general responsibility," up to two *additional* codes may be entered with code "A." This should facilitate the development of a more precise delineation of the relationship that should exist between the persons assigned or assuming codes "A" and "B."

Following are the *only* relationship code combinations that can be made:

Code "A" with Code "B" or "C," "CD," "CF," "CG," "D," "DF," "DG," "E," "EF," "EG," "F," "FG," or "G."

Code "B" with Code "A" only.

Code "C" with Code "A," "D," "E," "F," or "G."

Code "D" with Code "A," "C," "F," or "G."

Code "E" with Code "A," "C," "F," or "G."

Code "F" with Code "A," "C," "D," "E," or "G."

Code "G" with Code "A," "C," "D," "E," or "F."

If other relationships need to be recognized, and the position or organization title has not been listed, enter the title of the position or organization next to the listed titles and assign the relationship code in the appropriate space below. Also, if you believe a task descriptor or event has been omitted, or that it should be revised or eliminated, make whatever additions, changes, or deletions you think necessary.

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Using the median test (Siegel, 1956), pilot and control respondents were compared to the combined median on each item to determine whether significantly more respondents in one group fell above or below this common median on either the pre- or post-administration of the two questionnaires. The number of respondents for the pre-administration of the leadership team questionnaire were 82 and 364 for the pilot and control schools, respectively. For the post-administration of this questionnaire, 55 respondents from the pilot schools and 205 respondents from the control schools were available for analysis. The number of respondents for the pre-administration of the teacher questionnaire were 42 and 137 for the pilot and control schools, respectively. For the post-administration of this questionnaire, 29 respondents from the pilot schools and 135 from the control schools were available.

RESULTS

Computing the median test for each item on the leadership team questionnaire revealed that for the pre-administration, both the pilot and control respondents were drawn from populations having the same item medians ($P > .10$). A similar analysis on the post-administration indicated that the group receiving the MRG process has significantly higher medians ($P < .10$), indicating a more positive attitude when compared to the control group or items relating to the following areas of organizational qualities:

(4) clear, planned goals and objectives

(9) mutual support as it relates to team character

(11) attitude toward team goals and objectives

(18) quality of decisions

(23) congeniality

(24) productivity

(26) effectiveness

(27) job satisfaction

(28) leadership

(29) feedback

Computing the median test for each item on the teacher questionnaire revealed that for the pre-administration, the group receiving the treatment had significantly lower medians ($P<.10$) indicating a less positive attitude than the control group on items relating to the following areas:

(5) clear about decision-making authority

(7) open and supportive interaction between teachers and management team

(8) management team coordinates and integrates efforts

(10) management team provides appropriate leadership and direction

(11) management team makes decisions and solves problems

(12) teachers receive appropriate amount of information

(13) total staff has high level of confidence and trust

(16) total staff has high esprit and morale

(17) management team achieves goals

A similar analysis on the post-administration indicated that these initial differences were no longer significant ($P>.10$). However, the group receiving the MRG process had significantly ($P<.10$) lower median indicating a more negative attitude than the control group on items relating to knowing who to see when there is a problem and the amount of free-flowing communication within the organization.

DISCUSSION

It appears that the MRG process may be a feasible technique for integrating and coordinating people and resources to achieve goals within complex educational settings.

Leadership Teams' Questionnaires

The leadership teams within pilot schools perceived themselves as having a greater understanding of the goals and objectives relative to their jobs (item 4) and, consequently, they perceived improved attitudes toward the goals and objectives (item 11).

The MRG process required the leadership teams to identify objectives and discuss procedures for attaining them. The discussion phase progressed through the following stages: definition, negotiation, and ratification.

Positive change was also demonstrated with respect to the teams' belief that productivity had been enhanced (item 25). It could be postulated that enhanced productivity resulted from clarification and definition of goals; hence allowing people to perceive greater productivity, and effectiveness (item 26). It is possible that the perceived job satisfaction (item 27) resulted from joint goal definition, stemming from greater productivity and effectiveness. Since the MRG process focuses totally upon the job, and the achievement of the objectives for that job within a time frame, ultimate power acquisition and territoriality are not a consideration.

Although greater role clarity in terms of objectives and goals could result in greater mutual support (item 9) and congeniality (item 23) less complex

factors may have been operating. Leadership team members were together in a structured process which involved focused communication for approximately a half day each week for eighteen weeks. This association and the structured process may have enhanced communication which may have contributed greatly to the improvement of support and congeniality.

Perceived general leadership (item 28) also showed improvement when compared to the control group. The teams developed as a forum for policy formation, problem resolution, and decision-making. However, the teams did not perceive themselves as improving in the decision-making process (items 16, 17, & 18).

Communication did not show an overall improvement within the leadership teams except for feedback (item 29). Other items in communication, such as open communication, frequency of communication, and type of communication did not show significant improvement.

Feedback improved, possibly because the MRG process requires individuals to negotiate and reformulate ideas continuously within the group. Each team member learns, gives and receives feedback relative to their job and how their job is carried out. This process focuses upon the job rather than upon an individual's personality.

Interestingly, the four pilot teams did not demonstrate any difference in terms of the team flexibility (item 30) or vitality (item 32). One possible explanation maybe that each team was vital to begin with and utilized its vitality in a different manner. Too much flexibility may have been

reorganized as non-productive and, hence, each group maintained its own structure.

Teachers' Questionnaire

The teachers perceived greater problem solving ability (item 11) and increased achievement of goals and objectives (item 17). This may be explained through the negotiation process which provides for goal clarification and job task delineation, resulting in a perceived increase in achievement.

The teachers also believed that there was an increase in integration and coordination of people and tasks. This integration of people and tasks may have resulted from the intersection of the two axes of the matrix.

Clarity about decision-making authority (item 5) also was perceived by teachers to have increased. This may have resulted from the use of the MRG codes and their application to the matrix since all tasks and roles are clearly delineated in the MRG process.

The teachers believed the teams provided leadership and direction (item 10) which corresponds to the leadership team's own perception. The teams met on a regular basis to complete the matrix. However, it is not possible to separate the potential confounding effect of the regularly scheduled meetings from MRG process with respect to the teachers' perceptions of increased leadership and direction.

The teachers perceived the teams as being more open and supportive (item 7) and characterized the entire staffs as having a higher level of

trust (item 13) and morale (item 16) when compared to the control schools.

The teachers believed that they received enough information from the teams (item 12). However, they described the communication as not flowing up, down and laterally (item 15). This perception, on the part of the teachers, was possibly due to practical constraints of the organization which limited the number of teachers involved in the weekly process.

It can be concluded that the matrix organizational structure and, specifically, the MRG process can be applied to complex educational organizations. Multiple technical specialists were able to clarify their roles, functions and integrate their skills for goal attainment.

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APPENDIX A

SCHOOL OPERATIONS
ORGANIZATIONAL CHANGE PROJECT
DIVISION OF SPECIAL EDUCATION

RESPONDENT INFORMATION

Place a check by your position

Central Support Staff	_____	Principal	_____
Area Administrator	_____	Assistant Principal	_____
Area Psychologist	_____	Program Specialist	_____
Area Program Specialist	_____	Psychologist	_____
		Audiologist	_____
		Nurse	_____
		Teacher	_____
		Remedial Teacher	_____

ROLE CLARITY AND AMBIGUITY

I. *The questions in this section are designed to assess your level of clarity about certain aspects of your role.*

1. Do you feel you are always as clear as you would like to be about what you have to do in your current job?

_____ Yes _____ No

2. Which of the following alternative best represents how clear you are?

_____ Very clear.

_____ Quite clear on most things.

_____ Fairly clear.

_____ Not too clear.

_____ I am not at all clear.

II. *Indicate the extent to which the following statements express the condition which exists for you in your present position by circling the appropriate number. Please circle only one number per item.*

	almost never	*seldom*	*sometimes*	*often*	*almost always*
3. I feel certain about how much authority I have.	1	2	3	4	5

		almost never	*seldom*	*sometimes*	*often*	*almost always*
4.	There are clear, planned goals and objectives for my job.	1	2	3	4	5
5.	I know that I have divided my time properly.	1	2	3	4	5
6.	I know what my responsibilities are.	1	2	3	4	5
7.	I know exactly what is expected of me.	1	2	3	4	5
8.	Explanation is clear of what has to be done.	1	2	3	4	5

TEAM CHARACTER

III. *Analyze the character of your team (the group to which you belong---PAU team, an area staff group or central support services) by circling the number on the scale that corresponds to your perception with respect to each of these dimensions. Please circle only one number per item.*

Mutual Support

9.	Lack of concern for each other; every person for himself; little helping of each other in planning and problem-solving.	1	2	3	4	5	Genuine concern for each other; help each other improve job, plan and solve problems.

Team Goals and Objectives

10.	Unclear; diverse; conflicting.	1	2	3	4	5	Clear; understood; shared by all.
11.	Team is negative toward goals and objectives; displays lack of interest.	1	2	3	4	5	Team is committed to goals and objectives; displays interest.

Communications

12.	Team is guarded and cautious when communicating among and between members.	1	2	3	4	5	Team is open and authentic when communicating among and between members.

13.	Team rarely communicates with teachers; communicates inappropriate information; communicates ineffectively.	1	2	3	4	5	Team communicates pertinent information to teachers; communicates in effective manner.

Mutual Trust and Confidence

14.	Team is very suspicious of each other; demonstrates low confidence; skeptical of each other.	1	2	3	4	5	High trust and confidence among and between team members.
15.	Other staff members do not trust team; suspicious of team; little confidence in team.	1	2	3	4	5	Other staff members have high level of trust in team; high level of confidence.

Decision-Making

16.	Little opportunity for input; uninvolved; decisions made autonomously.	1	2	3	4	5	Decisions made jointly through group participation; plenty of opportunity for input; persons affected asked for their opinion.
17.	Decisions made at top with little or no lower level information; decisions not made on best information.	1	2	3	4	5	Decisions made at appropriate levels throughout the system; made where most adequate and accurate information is available.
18.	Decisions are vague, not understood; poor or no decisions made; lack of commitment to solutions.	1	2	3	4	5	Team makes good decisions; develops creative and appropriate solutions; solutions understood; commitment clear.

Handling Conflicts Within Team

19.	Deny, avoid or suppress conflicts.	1	2	3	4	5	Accept conflicts and "work them through".

Utilization of Member Resources

20.	Abilities, knowledge and experience are not utilized by the team.	1	2	3	4	5	Abilities, knowledge and experience are fully utilized by the team.

Affective Climate

21.	Unable to express feelings; feelings ignored; feelings criticized.	1	2	3	4	5	Free expression feelings; feelings understood and supported.

Cohesiveness

22.	Team is divided; there is an undercurrent pulling the team apart; there are tensions between members.	1	2	3	4	5	Team pulls together; works as a unit--- moving in same direction; team is attractive to its members; there is a feeling of camaraderie.

Congeniality

23.	Team members are disagreeable and unfriendly; there is animosity between some members.	1	2	3	4	5	Persons in team are friendly and easy to approach; members feel close to one another.

Cooperation/Coordination

24.	Members do not coordinate their efforts; little or no cooperation.	1	2	3	4	5	Members coordinate their efforts; high level of cooperation.

Productivity

25. Team has difficulty completing tasks; team accomplishes little; wanders through their agendas; team works inefficiently--results not worth effort. 1 2 3 4 5 Team completes tasks efficiently; produces worthwhile results; gets the job done; accomplishes a great deal

Effectiveness

26. Team is ineffective in meeting its purposes; does a poor job relative to other similar teams. 1 2 3 4 5 Team meets its purposes well; effective in its tasks; does well relative to other similar teams.

Satisfaction

27. Team members are unhappy with their job/colleagues/Team; morale is low; there is little personal enjoyment. 1 2 3 4 5 Members are pleased and happy with their job/colleagues/Team; morale is high; there is a sense of personal enjoyment.

Leadership

28. Team does not demonstrate leadership; no direction; too dependent on one or a few persons. 1 2 3 4 5 Team has appropriate direction; demonstrates leadership; leaders allowed to emerge; leadership shared.

Feedback

29. Members withhold their perceptions of each other's behavior and performance; interpersonal style is not discussed. 1 2 3 4 5 Members share their perceptions of each other's behavior and performance; interpersonal style is discussed among the team.

Flexibility

30. Team is rigid; too structured; too tightly controlled; team does not respond quickly. 1 2 3 4 5 Team is able to shift resources and attention quickly; able to respond to unusual demands; loosely structured; able to do things differently.

Problem Resolution

31. When problems occur, they are often not resolved; not dealt with; appealed to someone else. 1 2 3 4 5 Problems are worked out where they appear through mutual effort and understanding.

Vitality

32. Team operates in a sluggish manner; there is little excitement; spirits are generally low. 1 2 3 4 5 Team approaches its work with vim and vigor; spirit is high; there is a sense of excitement.

Relationships

33. Couldn't be worse; serious breakdown; lack of collaboration. 1 2 3 4 5 Collaborative; sound relations; full unit of effort achieved.

APPENDIX B

SCHOOL OPERATIONS
ORGANIZATIONAL CHANGE PROJECT
DIVISION OF SPECIAL EDUCATION

Identify PAU: _____

I. *Indicate the extent to which the following statements express the condition which exists for you in your present position by circling the appropriate number. Please circle only one number per item.*

	almost never	*seldom*	*sometimes*	*often*	*almost always*
1. When I have a specific problem, I know who to see.	1	2	3	4	5
2. When I have a specific problem or need help, the appropriate staff member is available.	1	2	3	4	5
3. When I have a specific problem or need help, the appropriate staff member is able to help me.	1	2	3	4	5
4. I am clear about what I have to do in my current job.	1	2	3	4	5
5. I am clear about which decisions I can make.	1	2	3	4	5
6. I am clear about which decisions require only my input.	1	2	3	4	5

Have you had a leadership team operating for the past one year?

yes ____ no ____

If your answer is <u>no</u>, respond to the following statements as you would think your leadership team <u>would function</u> at your PAU.					If your answer is <u>yes</u>, respond to the following statements as you think your leadership team <u>now functions</u>.
7. Interaction between the PAU leadership team and teachers is characterized by open and supportive interaction.	1	2	3	4	5
8. The PAU leadership team integrates and coordinates their efforts.	1	2	3	4	5

		almost never	*seldom*	*sometimes*	*often*	*almost always*
9.	The PAU leadership team knows and understands the problems faced by teachers.	1	2	3	4	5
10.	The PAU leadership team provides appropriate leadership and direction.	1	2	3	4	5
11.	The PAU leadership team makes good decisions and solves problems well.	1	2	3	4	5
12.	The amount of information I get from the PAU leadership team is appropriate for doing my job in the best possible manner.	1	2	3	4	5
13.	Our total staff is characterized by a high level of confidence and trust.	1	2	3	4	5
14.	Our total staff is characterized by cooperative teamwork.	1	2	3	4	5
15.	Our total staff is characterized by free-flowing communications--up, down and laterally.	1	2	3	4	5
16.	Our total staff is characterized by high espirit and morale.	1	2	3	4	5
17.	On the basis of your experience and information, how would you rate your leadership team in respect to fulfilling or achieving its goals?	1	2	3	4	5

Comments:

V. Comments:

Please return to Marilyn Gogolin
Organizational Consultant
School Operations

Envelope attached